

# SFA MODERNIZATION PARTNER PROJECT

## Enterprise Engineering Ombudsman System Redesign

### Bi-Weekly Status Report (3/14 to 3/31)

#### Planned Activity Summary

Planned Activities		Target	Status	Results
<b><i>March 2000 Report Creation</i></b>				
	<ul style="list-style-type: none"> <li>Identify Report Requirements</li> </ul>	2/18	C AE	<ul style="list-style-type: none"> <li>Data elements required for analysis have been identified and agreed upon. Data elements will come from either OCTS or NSLDS data bases</li> </ul>
	<ul style="list-style-type: none"> <li>Develop Methods to extract from OCTS and NSLDS</li> </ul>	2/18	C AE	<ul style="list-style-type: none"> <li>Access to OCTS has been obtained, data elements are known and have been selected, sample data has been retrieved. Access to NSLDS can be done, Chris Hill is in contact with Sandra Fowler to get this information retrieved.</li> </ul>
	<ul style="list-style-type: none"> <li>Define manual efforts required to add information</li> </ul>	2/25	C AE	<ul style="list-style-type: none"> <li>This will be assessed after looking at data and whether or not the data will be reported on. The manual data to be entered has been identified.</li> </ul>
	<ul style="list-style-type: none"> <li>Build Access Data Base</li> </ul>	3/10	C <E	<ul style="list-style-type: none"> <li>Data elements have been defined,</li> <li>Vince has moved data from OCTS to a database for Analysis</li> <li>NSLDS data was finally delivered after escalation.</li> <li></li> </ul>
	<ul style="list-style-type: none"> <li>Build Access management reports</li> </ul>	3/31	C AE	<ul style="list-style-type: none"> <li>Data analysis has been completed and awaits final review</li> </ul>
	<ul style="list-style-type: none"> <li>Provide analysis support</li> </ul>	3/17	C AE	<ul style="list-style-type: none"> <li>David Fein has completed data analysis</li> </ul>
	<ul style="list-style-type: none"> <li>Final report Prepared</li> </ul>	3/31	C AE	<ul style="list-style-type: none"> <li>Final deliverable presented 3/31</li> </ul>
<b><i>Replacement System Selection</i></b>				
	<ul style="list-style-type: none"> <li>Define Ombudsman Requirements</li> </ul>	2/18	C AE	<ul style="list-style-type: none"> <li>Ombudsman requirements at a high level have been identified. How requirements from other SFA organizations will be incorporated should be determined.</li> </ul>

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Planned Activities		Target	Status	Results
	• Identify CRM vendors	2/18	C AE	• 4 Vendors selected to hear presentations and visit customers. Clarify, Oracle, Siebel, and Vantive.
	• Develop Vendor evaluation Criteria	3/3	C AE	• Vendor evaluation criteria has been developed and agreed upon • Vendors have been provided with Process flows and sample data for their presentations
	• Schedule CRM Vendor Meetings	3/3	C AE	• Vendor meeting scheduled as follows: • Oracle 3/16, Clarify 3/17, Siebel 3/20 • Each visit 3 hours including customer visit
	• Evaluate CRM offerings	3/23	C AE	• Additional 2 hour presentations were held to better understand how the products are customized to meet the Ombudsman requirements
	• Select CRM Vendor	3/24	C AE	• Siebel recommended as the best product to meet the Ombudsman requirements.
	• Build Implementation Plan	3/31	C AE	• Implementation plan developed to meet a target conversion date of 6/30/2000. Implementation plan will be further defined as the implementation begins.
	• Prepare Task order Proposal	3/31		• Work underway to develop the implementation task order.
	•			•

(\*) **Valid Status:** (AE)-As Expected, (>E)- Greater than Expected, (<E)-Less than Expected, (C)-Complete

**Plans for Next Week**

Planned Activities	
• Final review of Deliverables	4/7
• Complete Final Project report	4/7
• Prepare Task Order for implementation	ASAP
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**Schedule of Key Meetings**

Key Meeting	Date

**Risk Summary**

The following section is intended to inform management and team members about project risk areas and their potential consequences. Risks are evaluated in terms of their potential impact on meeting the target completion date (**schedule**), increasing project costs (**cost**), and/or decreasing quality of deliverables (**quality**).

RISK	SYMPTOMS	RESPONSES	Severity of Impact	Probability of Occurrence	Ability to Control	DATE Reduced by 50%	DATE Complete	Resp
	<ul style="list-style-type: none"><li></li><li></li></ul>	<ul style="list-style-type: none"><li></li><li></li></ul>						

**Issue Summary**

Issue	Recommended Solution	Resp	Creation Date	Resolve Date	Status

**Staffing Updates:**  
None

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**Other Relevant Information:**

None